

FastLane Help System Letters of Intent

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Letters of Intent Letters of Intent Introduction

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A Letter of Intent provides NSF with a snapshot and concise summary of the goals of a forthcoming proposal, in response to an NSF solicitation.

The term "program solicitation" refers to formal NSF publications that encourage the submission of proposals in specific program areas of interest to NSF. Program solicitations normally apply for a limited period of time.

Program solicitations vary in their requirements for a Letter of Intent (see <u>What Is</u> the Letter of Intent Form?)

You can create more than one Letter of Intent for a single program solicitation. However, a warning message displays that a Letter of Intent has already been submitted for that solicitation.

Roles

The PI can do the following:

- Create a Letter of Intent for any available solicitation
- Submit directly to the NSF Letters of Intent for certain types of solicitations
- Forward a Letter of Intent to the SPO for those types of solicitations that require SPO approval

The Sponsored Project Office (SPO) can do the following:

- Create a Letter of Intent for certain types of solicitations
- View all Letters of Intent created by PIs in their organization, including those the PI directly submitted to NSF
- · Edit Letters of Intent forwarded by the PI
- Submit a Letter of Intent
- Return a Letter of Intent to a PI

To work on Letters of Intent, see one of the following for instructions:

- · Create a Letter of Intent Introduction
- Work on Saved and Submitted Letters of Intent

Create a New Letter of Intent

Create a Letter of Intent Introduction

The process of creating a Letter of Intent involves has four steps:

 Access the Letters of Intent screen on the Create New LOI from Solicitation tab.

See Access the Letters of Intent Screen as a PI or Access the Letters of Intent Screen as an SPO for instructions.

- 2. Find the solicitation that you want to prepare a Letter of Intent in response to. See Step 2 Find a Solicitation.
- 3. Access and complete the Letter of Intent form.
 - See <u>What Is the Letter of Intent Form?</u> and Complete the Letter of Intent Form for instructions.
- 4. Process the Letter of Intent.

See one of the following for instructions:

- Save a New Letter of Intent
- Forward a New Letter of Intent to the SPO
- Submit a New Letter of Intent

Step 1 Access the Letters of Intent Screen

Step 1 Access the Letters of Intent Screen

Access the **Letters of Intent** screen by role:

- As a PI As an SPO

Access the Letters of Intent Screen as a PI

1. On the **FastLane Home Page** screen, log in as a PI to Proposals, Status, and Awards (see <u>PI/Co-PI Login</u>). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

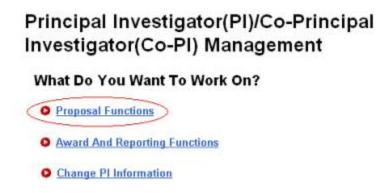


Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI)

Management screen. The Proposal Functions link is circled.

Principal Investigator(PI)/Co-Principal

 Click Proposal Functions (Figure 1). The Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen displays (Figure 2).



Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI)
Management Proposal Functions screen. The Letters of Intent link is circled.

3. Click Letters of Intent (Figure 2). The Letters of Intent screen displays on the Create New LOI from Program Solicitation tab (Figure 3) with a listing of the available solicitations. You have these options on this screen:

- · View all program solicitations
- Search for solicitations
- View a program solicitation
- Complete the Letter of Intent Form

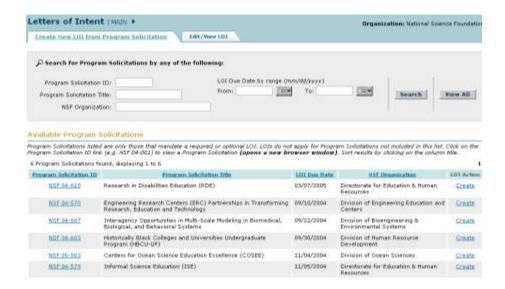


Figure 3 Letters of Intent screen on the Create New LOI from Program Solicitation tab.

See Step 2 Find a Solicitation.

Access the Letters of Intent Screen as an SPO

1. On the **FastLane Home Page** screen, log in to Research Administration (see SPO Login). The **Research Administration** screen displays (Figure 1).



Figure 1 Research Administration screen. The Letters of Intent link is circled.

2. Click Letters of Intent (Figure 1). The Letters of Intent screen displays on the Edit/View LOI tab (Figure 2).

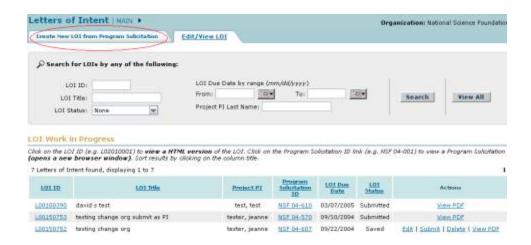


Figure 2 Letters of Intent screen on the Edit/View LOI tab. The Create New LOI from Program Solicitation tab is circled.

3. Click the **Create New LOI from Program Solicitation** tab (Figure 2). The **Letters of Intent** screen displays on the **Create New LOI from Program**

Solicitation tab (Figure 3) with a listing of available solicitations. You have these options:

- View all program solicitations
- Search for solicitations
- View a program solicitation
- · Complete the Letter of Intent Form

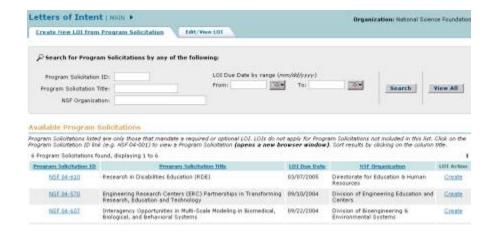


Figure 3 Letters of Intent screen on the Create New LOI from Program Solicitation tab.

See Step 2 Find a Solicitation.

Step 2 Find a Solicitation

Step 2 Find a Solicitation

There are three ways to find a solicitation:

- View all solicitations
- Search for a solicitation
- View a solicitation

View All Program Solicitations

 Access the Letters of Intent screen on the Create New LOI from Program Solicitation tab (Figure 1) (see Access the Letters of Intent Screen as PI or Access the Letters of Intent Screen as an SPO).

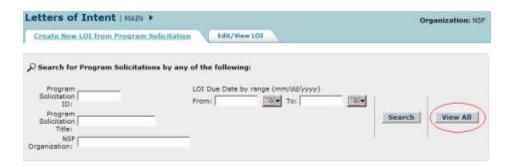


Figure 1 Letters of Intent screen on the Create New LOI from Program Solicitation tab. The View All button is circled.

- 2. Click the View All button (Figure 1). The Letters of Intent screen displays on the Create New LOI from Program Solicitation tab, with all program solicitations listed in the Available Program Solicitations section (Figure 2). You have these options:
 - · View a program solicitation
 - Complete the Letter of Intent form

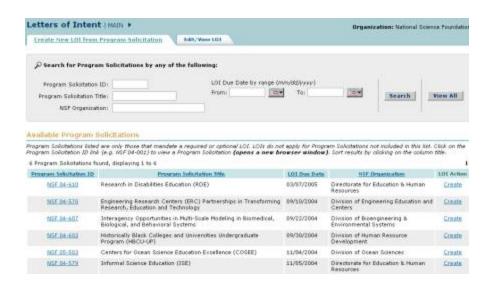


Figure 2 Letters of Intent screen on the Create New LOI from Program Solicitation tab. All the available solicitations are listed.

See also:

- Search for Solicitations
- · View a Program Solicitation
- Step 3 Complete the Letter of Intent

Search for Solicitations

 Access the Letters of Intent screen on the Create New LOI from Program Solicitation tab (Figure 1) (see Access the Letters of Intent Screen as PI or Access the Letters of Intent Screen as an SPO).



Figure 1 Letters of Intent screen on the Create New LOI from Program Solicitation tab. The Search button is circled.

- 2. In the **Search for Program Solicitations** section (Figure 1), you can search for solicitations by any one or a combination of the following:
 - Program Solicitation ID
 In the Program Solicitation ID box (Figure 1), type the Program Solicitation ID.
 - Program Solicitation Title
 In the Program Solicitation Title box (Figure 1), type the Program Solicitation title.
 - NSF Organization
 In the NSF Organization box (Figure 1), type the name of the NSF organization. See http://www.nsf.gov/funding/research_edu_community.jsp for a listing of NSF organizations.
 - Letter of Intent Due Date Range
 In the From box (Figure 1), type the start date for the date range.
 In the To box (Figure 1), type the end date for the date range.
- Click the Search button (Figure 1). The Letters of Intent screen displays on the Create New LOI from Program Solicitation tab (Figure 2) with the results of your search listed in the Available Program Solicitations section.



Figure 2 Letters of Intent screen on the Create New LOI from Program Solicitation tab. The search results are listed in the Available Program Solicitations section.

See also:

- View All Program Solicitations
- View a Program Solicitation
- Step 3 Complete the Letter of Intent

View a Program Solicitation

 Access the Letters of Intent screen on the Create New LOI from Program Solicitation tab (Figure 1) (see Access the Letters of Intent Screen as PI or Access the Letters of Intent Screen as an SPO).

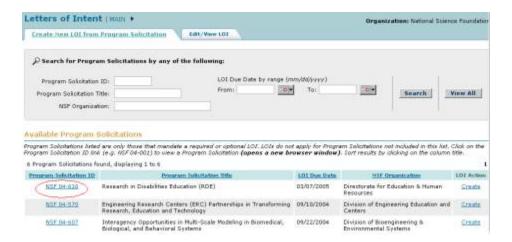


Figure 1 Letters of Intent screen on the Create New LOI from Program Solicitation tab. The Program Solicitation ID is circled for a solicitation.

2. In the **Available Program Solicitation** section, click the Program Solicitation ID (Figure 1) on the row of the Program Solicitation you want to view. The link for the solicitation displays in a new window (Figure 2).

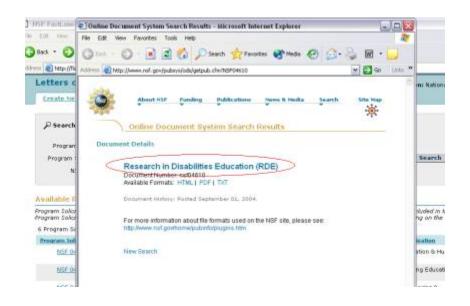


Figure 2 Program Solicitation link (circled) in a new window

3. In the new window, click the title of the solicitation (Figure 2). The solicitation displays in PDF format (Figure 3). You can also click on the link for the HTML or the text version to view the solicitation in either of those formats.

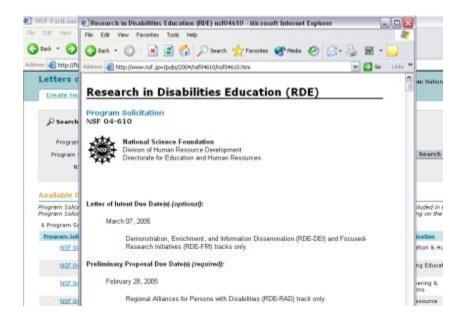


Figure 3 Text of the solicitation in the new window.

Note: If you need Adobe Reader to read the PDF file, click **Adobe Acrobat Reader** at the bottom of the **Letters of Intent** screen.

See also:

- View All Program Solicitations
- Search for Solicitations
- Step 3 Complete the Letter of Intent

Step 3 Complete Letter of Intent Form

Step 3 Complete the Letter of Intent Form

See What is the Letter of Intent Form? for an overview of the required information for the form.

 Access the Letters of Intent screen on the Create New LOI from Program Solicitation tab (Figure 1) (see Access the Letters of Intent Screen as PI or Access the Letters of Intent Screen as an SPO).



Figure 1 Letters of Intent screen on the Create New LOI from Program Solicitation tab. The Create link is circled.

- 2. Determine which solicitation you want to create a Letter of Intent for (see Search for Solicitations, <u>View All Program Solicitations</u>, and <u>View a Program Solicitation</u>).
- 3. In the Available Program Solicitations section of the Letters of Intent screen on the Create New LOI from Program Solicitations tab (Figure 1), click Create on the row for the solicitation that you want to create a Letter of Intent for. The Create New LOI screen displays (Figure 2).

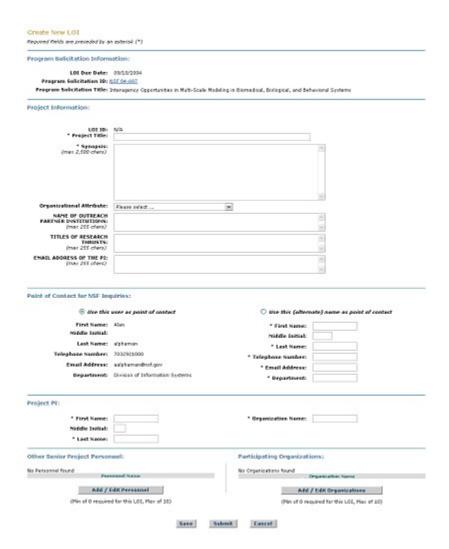


Figure 2 Create LOI screen.

- 4. In the **Project Information** section, in the **Project Title** box (Figure 2), type the Project Title of the Letter of Intent.
- 5. In the **Synopsis** box (Figure 2), type or copy and paste a synopsis of the proposed project.
- 6. From the **Organizational Attribute** drop-down list (Figure 2), choose the organizational attribute (optional).
- 7. Type messages to any or all of the following (Figure 2):
 - NSF division, NIH Institute, NASA, or DOE for the primary assignment (optional)
 - NSF division, NIH Institute, NASA, or DOE for the second assignment (optional)
 - · The Program Officer who has expressed interest in the project (optional)
- 8. In the **Point of Contact for NSF Inquiries** section (Figure 2), click the radio button for either of the following:
 - Use this user as point of contact (individual's information is displayed already)
 - · Use (alternate) name as point of contact
- 9. If you use the alternate point of contact:

- In the **First Name** box (Figure 2), type the alternate's first name.
- In the **Middle Initial** box (Figure 2), type the alternate's middle initial (optional).
- In the **Last Name** box (Figure 2), type the alternate's last name.
- In the **Telephone Number** box (Figure 2), type the alternate's telephone number.
- In the **Email Address** box (Figure 2), type the alternate's email address.
- 10. In the **Project PI** section (Figure 2), type the following:
 - In the **First Name** box, type the PI's first name.
 - In the Middle Initial box, type the PI's middle initial (optional).
 - In the **Last Name** box, type the PI's last name.
 - In the **Organization** box, type the name of your organization.
- 11. In the **Other Senior Project Personnel** section (Figure 2), *if you need to change information on Senior Personnel or add or delete Senior Personnel*, click the **Add/Edit Personnel** button. See <u>Add/Edit Personnel</u> for instructions.
- 12. In the **Participating Organizations** section (Figure 2), *if you need to add or delete participating organizations*, click the **Add/Edit Organizations** button. See Add/Edit Organizations for instructions.
- 13. After you have completed the Letter of Intent, you have these options:
 - Save the Letter of Intent
 - Forward the Letter of Intent to the SPO (PI only)
 - <u>Submit the Letter of Intent</u> (SPO for all Letters of Intent and PI for some types of Letters of Intent)

What Is the Letter of Intent Form?

Solicitations vary in their requirements for a Letter of Intent. FastLane displays only those information fields that are required for the solicitation you are creating the Letter of Intent for.

All Letters of Intent request this information:

- Title of the project
- Synopsis of the project
- · Confirmation of the point of contact for NSF inquiries
- The name and relevant information of the project PI

The Letters of Intent form for some Solicitations may also display fields for any or all of the following:

- Comments other than the Synopsis (always optional)
- Answers to one to three questions that the Program Officer presents for that solicitation
- Selection of an organizational attribute for your organization
- Selection of Primary Division, Secondary Division, and Tertiary Division for cross-directorate/multi-disciplinary Letters of Intent
- Sending messages to the Program Officer
- Sending messages to relevant NSF divisions or other agencies for the primary and second assignment

The Letter of Intent form may also provide the opportunity to do the following:

- Add or edit the information for Senior Persons
- Add or edit the information for organizations

See Complete the Letter of Intent Form for instructions on how to work on the Letter of Intent form.

Add/Edit Personnel

1. Access the **Create New LOI** screen (Figure 1) (see Complete the Letter of Intent Form).

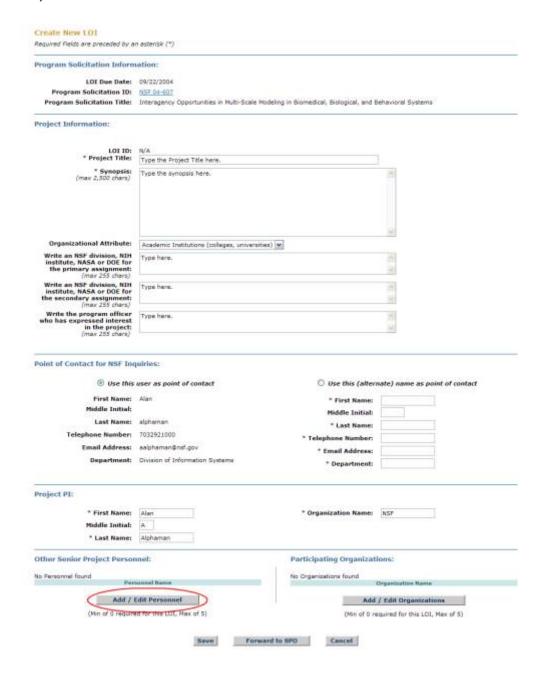


Figure 1 Create LOI screen. The Add/Edit Personnel button is circled.

 In the Other Senior Project Personnel section (Figure 1), click the Add/Edit Personnel button. The Create LOI—Add/Edit Other Senior Project Personnel screen displays (Figure 2).

- 3. In the **Other Senior Project Personnel** section (Figure 2), complete the following:
 - In the **First Name** box, type the Senior Person's first name.
 - In the Middle Initial box, type the Senior Person's middle initial (optional).
 - In the **Last Name** box, type the Senior Person's last name.
 - In the **Organization Name** box, type the Senior Person's organization.
 - In the **Department** box, type the Senior Person's department.
 - In the City box, type the city of the Senior Person's organization.
 - In the **State** box, select the state of the organization from the drop-down list (required for United States only).
 - In the **Country** box, select the country of the organization from the drop-down list.

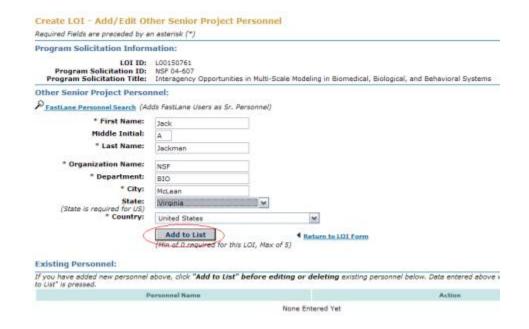


Figure 2 Create LOI—Add/Edit Other Senior Project Personnel screen. The Add to List button is circled.

- 4. Click the Add to List button (Figure 2). The Create the LOI—Add/Edit Other Senior Project Personnel screen displays (Figure 3) again with the name of the added individual listed in the Existing Personnel section. You have two new options:
 - · Edit the Senior Person's information
 - · Delete a Senior Person

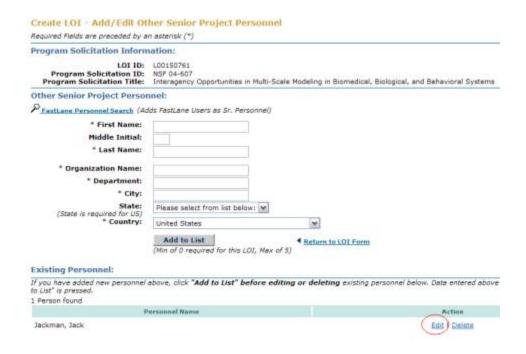


Figure 3 Create LOI—Add/Edit Other Senior Project Personnel screen. The Edit link is circled.

Edit the Senior Person's Information

1. On the Create LOI—Add/Edit Other Senior Project Personnel screen (Figure 3), click Edit. The Create LOI—Add/Edit Other Senior Project Personnel screen displays (Figure 4) with the Senior Person's information.



Figure 4 Create LOI—Add/Edit Other Senior Project Personnel screen. The Save Changes button is circled.

- 2. Edit the information as you require (see <a>Step 3, <a>Add/Edit Personnel).
- 3. Click the **Save Changes** button (Figure 4). The **Create LOI—Add/Edit Other Senior Project Personnel** screen displays again.

Delete the Senior Person

On the Create LOI—Add/Edit Other Senior Project Personnel screen (Figure 5), click **Delete** in the row for the Senior Person whose name you want to delete. The Create LOI—Add/Edit Other Senior Project Personnel screen displays (Figure 6) with the Senior Person's name no longer listed in the Existing Personnel section.

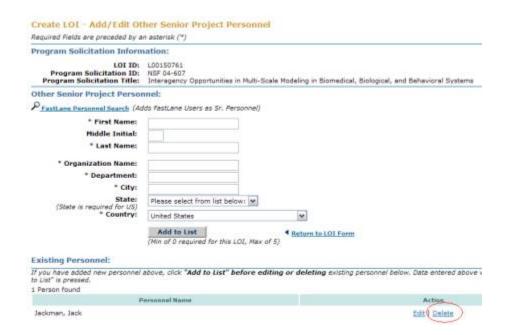


Figure 5 Create LOI—Add/Edit Other Senior Project Personnel screen. The Delete link is circled.

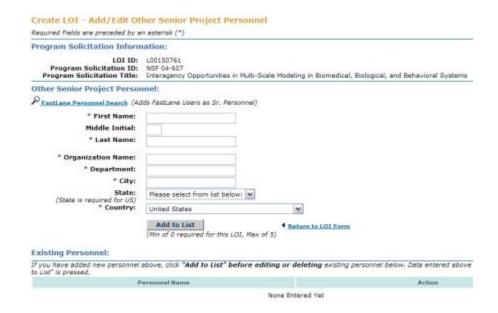


Figure 6 Create LOI—Add/Edit Other Senior Project Personnel screen with the Senior Person's name no longer listed in the Existing Personnel section.

See Step 3 Complete the Letter of Intent Form.

Add/Edit Organizations

1. Access the **Create New LOI** screen (Figure 1) (see Complete the Letter of Intent Form).

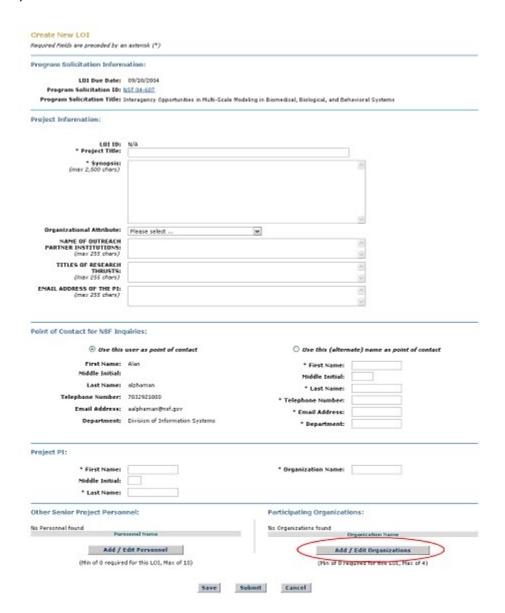


Figure 1 Create New LOI screen. The Add/Edit Organizations button is circled.

 In the Participating Organizations section (Figure 1), click the Add/Edit Organizations button. The Create LOI—Add/Edit Participating Organizations screen displays (Figure 2).



Figure 2 Create LOI—Add/Edit Participating Organizations screen. The FastLane Organization Search link is circled.

3. Click **FastLane Organization Search** (Figure 2) to find the name of the participating organization as it is registered with FastLane. The **FastLane Organization Search** screen displays (Figure 3).



Figure 3 FastLane Organization Search screen. The Search Organization button is circled.

- 4. In the **Organization Name** box (Figure 3), type at least three letters of the organization you are searching for.
- 5. Click the radio button for one of the following search criteria (Figure 3):
 - **Begins with** returns all organizations whose name begins with the text entered.
 - Ends with returns all organizations whose name ends with the text entered.
 - **Contains** returns all organizations whose name contains the text entered.
- 6. Click the **Search Organization** button (Figure 3). The **FastLane Organization Search Result** screen displays (Figure 4) with a list of the organizations that meet your search criteria.



Figure 4 FastLane Organization Search Result screen. The Select button is circled.

- 7. Click the radio button next to an organization name to select an organization (Figure 4).
- 8. Click the **Select** button (Figure 4). The **Create LOI—Add/Edit Participating Organization** screen displays (Figure 5) with the name of the organization in the **Organization Name** box.



Figure 5 Create LOI—Add/Edit Participating Organization screen. The Add to List button is circled.

Click the Add to List button (Figure 5). The Create LOI—Add/Edit
 Participating Organization screen displays (Figure 6) with the name of the
 organization listed in the Existing Organizations section. You now have the
 option to delete the organization.



Figure 6 Create LOI—Add/Edit Participating Organization screen. The Delete button is circled.

Delete an Organization

On the **Create LOI—Add/Edit Participating Organization** screen (<u>Figure 6</u>), in the **Existing Organizations** section, click **Delete** on the row of the organization you want to delete. The **Create LOI—Add/Edit Participating Organization** screen displays (Figure 7) with the organization's name removed from the **Existing Organizations** section.



Figure 7 Create LOI—Add/Edit Participating Organization screen with the name of the organization no longer listed in the Existing Organizations section.

See Step 3 Complete the Letter of Intent Form.

Step 4 Process a New Letter of Intent

Step 4 Process a New Letter of Intent

There are three ways to process a newly created Letter of Intent:

- Save a new Letter of Intent
- Forward a new Letter of Intent to the SPO (PI only)
- Submit a Letter of Intent (SPO only)

Save a New Letter of Intent

1. Access the **Create New LOI** screen (Figure 1) and complete the Letter of Intent form (see Complete the Letter of Intent Form).

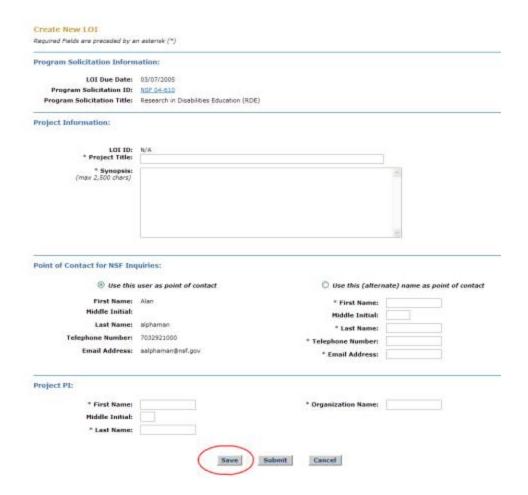


Figure 1 Create New LOI screen. The Save button is circled.

 Click the Save button (Figure 1). The Confirmation LOI Saved screen displays (Figure 2) with the message that the Letter of Intent is now saved. The Letter of Intent is now listed in the LOI Work in Progress section of the Letters of Intent screen on the Edit/View LOI tab (Figure 3). To work on the Letter of Intent again, see <u>Access Saved or Submitted Letters of Intent as a PI</u> or <u>Access Saved or Submitted Letters of Intent as an SPO</u>.



Figure 2 Confirmation LOI Saved screen.



Figure 3 Letters of Intent screen on the Edit/View LOI tab. In the LOI Work in Progress section, the newly saved Letter of Intent is circled.

See also:

Forward a New Letter of Intent to the SPO Submit a New Letter of Letter

Forward a New Letter of Intent to the SPO

Only the PI has the option to forward a Letter of Intent to the SPO.

1. Access the **Create New LOI** screen (Figure 1) and complete the Letter of Intent form (see Complete the Letter of Intent Form).

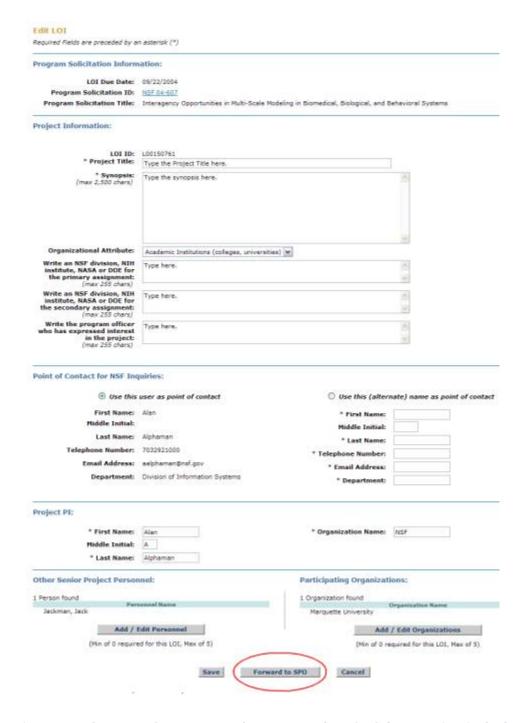


Figure 1 Create LOI screen. The Forward to SPO button is circled.

Click the Forward to SPO button (Figure 1). The Confirm LOI screen displays (Figure 2) with a message for you to confirm that you want to forward the Letter of Intent to NSF.

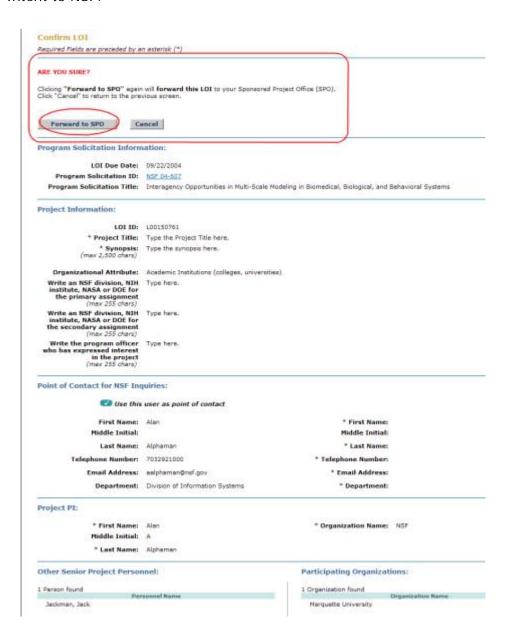


Figure 2 Confirm LOI screen. The Forward to SPO button is circled.

3. Click the **Forward to SPO** button (Figure 2). The **Confirmation LOI Forwarded to SPO** screen displays (Figure 3) with the message that the Letter of Intent has been forwarded to the SPO.



Figure 3 Confirmation LOI Forwarded to SPO screen.

See also:

- Save a New Letter of Intent
- Submit a New Letter of Letter

Submit a New Letter of Intent

An SPO may submit any Letter of Intent.

A PI may directly submit Letters of Intent for certain types of solicitations. If a PI can submit a Letter of Intent, the **Submit to NSF** button displays, rather than the **Forward to SPO** button, on the **Create New LOI** screen.

1. Access the **Create New LOI** screen (Figure 1) and complete the Letter of Intent form (see Complete the Letter of Intent Form).

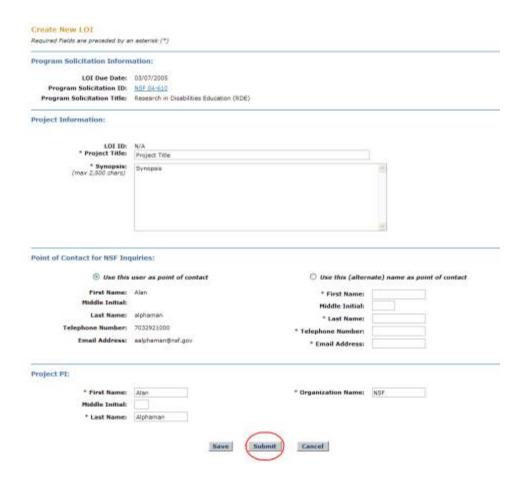


Figure 1 Create New LOI screen. The Submit button is circled.

Click the Submit button (Figure 1). The Confirm LOI screen displays (Figure 2) with a message for you to confirm that you want to submit the Letter of Intent to NSF.



Figure 2 Confirm LOI screen. The Submit button is circled.

3. Click the **Submit** button (Figure 2). The **Confirmation LOI Submitted to NSF** screen displays (Figure 3) with the message that the Letter of Intent has been submitted.



Figure 3 Confirmation LOI Submitted to NSF screen.

- Save a New Letter of Intent
- Forward a New Letter of Intent to the SPO

Work on Saved and Submitted Letters of Intent Work on Saved and Submitted Letters of Intent

You have these options in working on saved and submitted Letters of Intent:

- Search for Letters of Intent
- View Letters of Intent
- View a Program Solicitation for a Letter of Intent
- Edit a Letter of Intent
- Forward a Letter of Intent to the SPO (PI only)
- Submit a Letter of Intent to NSF (SPO only)
- Return a Letter of Intent to the PI (SPO only)
- Delete a Letter of Intent

See Access Saved and Submitted Letters of Intent as a PI or Access Saved and Submitted Letters of Intent as an SPO to begin working.

Access Saved and Submitted Letters of Intent Access Saved and Submitted Letters of Intent

Access saved and submitted Letters of Intent by role:

- <u>As a PI</u>
- As an SPO

Access Saved or Submitted Letters of Intent as a PI

 On the FastLane Home Page screen, log in as a PI to Proposals, Status, and Awards (see PI/Co-PI Login). The Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen displays (Figure 1).

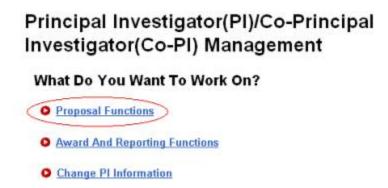


Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI)

Management screen. The Proposal Functions link is circled.

Principal Investigator(PI)/Co-Principal

 Click Proposal Functions (Figure 1). The Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen displays (Figure 2).



Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Letters of Intent link is circled.

3. Click Letters of Intent (Figure 2). The Letters of Intent screen displays on the Create New LOI from Solicitation tab (Figure 3).



Figure 3 Letters of Intent screen on the Create New LOI from Program Solicitation tab. The Edit/View LOI tab is circled.

- 4. Click the **Edit/View LOI** tab (Figure 3). The **Letters of Intent** screen displays on the **Edit/View LOI** tab (Figure 4). You have these options, depending upon the status of the Letter of Intent:
 - · Search for Letters of Intent
 - · Edit a Letter of Intent
 - · Forward a Letter of Intent to the SPO or Submit a Letter of Intent to NSF
 - · View a Letter of Intent in HTML format
 - · View a Letter of Intent in PDF format
 - · View a Program Solicitation for a Letter of Intent
 - · Delete a Letter of Intent

(Click on any link above to see instructions for that action.)



Figure 4 Letters of Intent screen on the Edit/View LOI tab.

- Search for Saved and Submitted Letters of Intent
- View Saved and Submitted Letters of Intent

Access Saved or Submitted Letters of Intent as an SPO

1. On the **FastLane Home Page** screen, log in to Research Administration (see SPO Login). The **Research Administration** screen displays (Figure 1).



Figure 1 Research Administration screen. The Letters of Intent link is circled.

- 2. Click Letters of Intent (Figure 1). The Letters of Intent screen displays on the Edit/View LOI tab (Figure 2). You have these options on this screen:
 - Search for Letters of Intent
 - Edit a Letter of Intent
 - Submit a Letter of Intent to NSF
 - Return a Letter of Intent to the PI
 - · View a Letter of Intent in HTML format
 - View a Letter of Intent in PDF format
 - View a Program Solicitation for a Letter of Intent
 - Delete a Letter of Intent

(Click on any link above to see instructions for that action.)

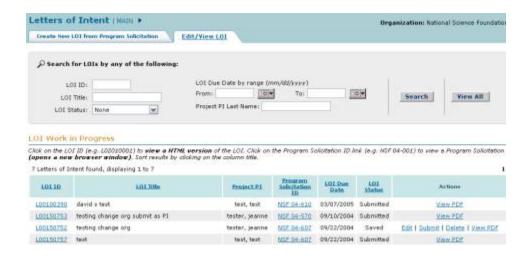


Figure 2 Letters of Intent screen on the Edit/View LOI tab.

- Search for Saved and Submitted Letters of Intent
- View Saved and Submitted Letters of Intent

Search for Saved and Submitted Letters of Intent Search for Saved and Submitted Letters of Intent

Search for saved and submitted Letters of Intent by role:

- As a PIAs an SPO

Search for Letters of Intent as a PI

1. Access the **Letters of Intent** screen on the **Edit/View LOI** tab (Figure 1) (see Access Saved or Submitted Letters of Intent as PI).



Figure 1 Letters of Intent screen on the Edit/View LOI tab. The Search button is circled.

- 2. In the **Search for LOIs** section (Figure 1), you can search for Letters of Intent by any one or a combination of the following:
 - Letter of Intent ID
 In the LOI ID box (Figure 1), type the Letter of Intent ID.
 - Letter of Intent Title
 In the LOI Title box (Figure 1), type the Letter of Intent title.
 - LOI Status
 Select the status you want to search for from the drop-down list (Figure 1).
 - Letter of Intent Due Date Range
 In the From box (Figure 1), type the start date for the date range.
 In the To box (Figure 1), type the end date for the date range.
- 3. Click the **Search** button (Figure 1). The **Letters of Intent** screen displays on the **Edit/View LOI** tab (Figure 2) with the results of your search in the **LOI Work** in **Progress** section.



Figure 2 Letters of Intent screen on the Edit/View LOI tab with the search results in the LOI Work in Progress section.

See also View Saved and Submitted Letters of Intent.

Search for Letters of Intent as an SPO

1. Access the **Letters of Intent** screen on the **Edit/View LOI** tab (Figure 1) (see Access Saved or Submitted Letters of Intent as SPO).



Figure 1 Letters of Intent screen on the Edit/View LOI tab. The Search button is circled.

- 2. In the **Search for LOIs** section (Figure 1), you can search for Letters of Intent by any one or a combination of the following:
 - Letter of Intent ID
 In the LOI ID box (Figure 1), type the Letter of Intent ID.
 - Letter of Intent Title
 In the LOI Title box (Figure 1), type the Letter of Intent title.
 - In the LOI Title box (Figure 1), type the Letter of Intent title.

 LOI Status
 - Select the status you want to search for from the drop-down list (Figure 1).
 Letter of Intent Due Date Range
 In the From box (Figure 1), type the start date for the date range.
 In the To box (Figure 1), type the end date for the date range.
 - Project PI Last Name
 In the Project PI Last Name box (Figure 1), type the last name of the PI who forwarded the Letter of Intent.
- 3. Click the **Search** button (Figure 1). The **Letters of Intent** screen displays on the **Edit/View LOI** tab (Figure 2) with the results of your search in the **LOI Work** in **Progress** section.



Figure 2 Letters of Intent screen on the Edit/View LOI tab with the search results in the LOI Work in Progress section.

See also View Saved and Submitted Letters of Intent.

View Saved and Submitted Letters of Intent View Saved and Submitted Letters of Intent

There are three ways to view Letters of Intent:

- View all Letters of Intent
- View a Letter of Intent in HTML format
- View a Letter of Intent in PDF format

See also Search for Saved and Submitted Letters of Intent

View All Letters of Intent

 Access the Letters of Intent screen on the Edit/View LOI tab (Figure 1) (see <u>Access Saved or Submitted Letters of Intent as a PI</u> or <u>Access Saved or</u> Submitted Letters of Intent as an SPO).



Figure 1 Letters of Intent screen on the Edit/View LOI tab. The View All button is circled.

- Click the View All button (Figure 1). The Letters of Intent screen displays on the Edit/View LOI tab (Figure 2) with a full listing of all Letters of Intent in the LOI Work in Progress section:
 - For the PI, all Letters of Intent created by the PI, including Letters of Intent that have been forwarded to the SPO or submitted to NSF
 - For the SPO, all Letters of Intent created by the SPO's organization

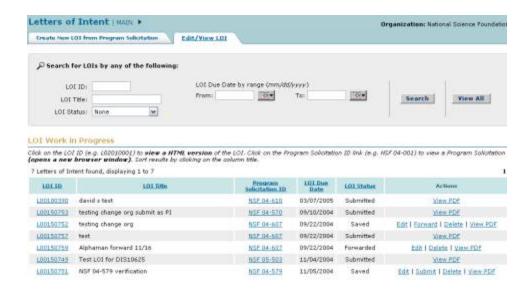


Figure 2 Letters of Intent screen on the Edit/View tab with a full listing of all Letters of Intent.

- View a Letter of Intent in HTML Format
- View a Letter of Intent in PDF Format

View a Letter of Intent in HTML Format

 Access the Letters of Intent screen on the Edit/View LOI tab (Figure 1) (see <u>Access Saved or Submitted Letters of Intent as a PI</u> or <u>Access Saved or</u> <u>Submitted Letters of Intent as an SPO</u>).



Figure 1 Letters of Intent screen on the Edit/View LOI tab. The LOI ID number is circled for a Letter of Intent.

2. In the **LOI Work in Progress** section (Figure 1), click the LOI ID number on the row for the Letter of Intent that you want to view in HTML format. The Letter of Intent displays (Figure 2).

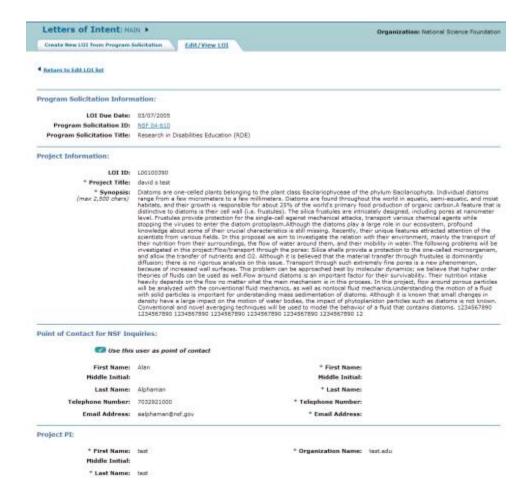


Figure 2 Screen with the Letter of Intent displayed.

- View All Letters of Intent
- View a Letter of Intent in PDF Format

View a Letter of Intent in PDF Format

 Access the Letters of Intent screen on the Edit/View LOI tab (Figure 1) (see <u>Access Saved or Submitted Letters of Intent as a PI</u> or <u>Access Saved or</u> <u>Submitted Letters of Intent as an SPO</u>).



Figure 1 Letters of Intent screen on the Edit/View tab. The View PDF link is circled for a Letter of Intent.

2. Click **View PDF** on the row for the Letter of Intent whose PDF you want to view (Figure 1). A new screen displays with the Letter of Intent in PDF format.

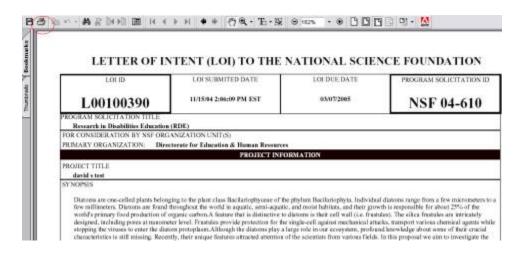


Figure 2 Screen with the Letter of Intent in PDF format.

3. Click the browser back button to return to the **Letters of Intent** screen on the **Edit/View LOI** tab (Figure 1).

Note: If you need Adobe Reader to read the PDF file, click **Adobe Acrobat Reader** at the bottom of the **Letters of Intent** screen (Figure 3).

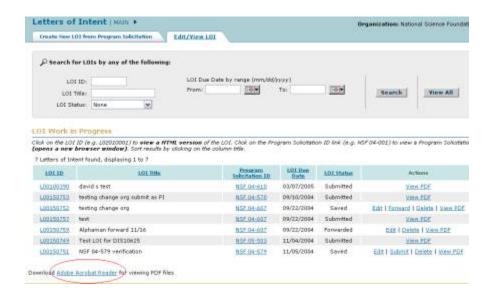


Figure 3 Letters of Intent screen on the Edit/View LOI tab. The Adobe Acrobat Reader link is circled.

- View All Letters of Intent
- View a Letter of Intent in HTML Format

View the Program Solicitation for a Letter of Intent

 Access the Letters of Intent screen on the Edit/View LOI tab (Figure 1) (see Access Saved or Submitted Letters of Intent as a PI or Access Saved or Submitted Letters of Intent as an SPO).



Figure 1 Letters of Intent screen on the Edit/View LOI tab. The Program Solicitation ID is circled for a Letter of Intent.

2. In the **LOI in Progress** section, click the Program Solicitation ID in the row for the Letter of Intent that you want to view the program solicitation for (Figure 1). The link for the solicitation displays in a new window (Figure 2).



Figure 2 Program Solicitation link (circled) in a new window

3. In the new window, click the title of the solicitation (Figure 2). The solicitation displays in PDF format (Figure 3). (You can also click the link for the HTML or the text version to view the solicitation in either of those formats.)

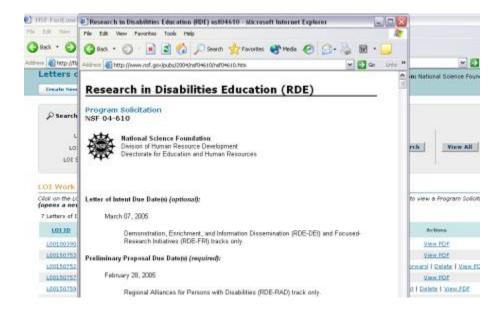


Figure 3 Text of the solicitation in the new window.

Note: If you need Adobe Reader to read the PDF file, click **Adobe Acrobat Reader** at the bottom of the **Letters of Intent** screen (Figure 4).

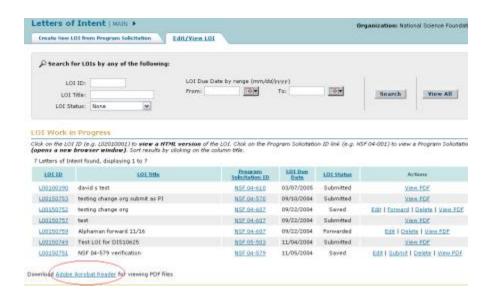


Figure 4 Letters of Intent screen on the Edit/View LOI tab. The Adobe Acrobat Reader link is circled.

- Edit a Saved Letter of Intent
- Forward a Saved Letter of Intent to the SPO
- Submit a Letter of Intent to NSF
- Return a Letter of Intent to the PI
- Delete a Letter of Intent

Edit a Saved Letter of Intent

 Access the Letters of Intent screen on the Edit/View LOI tab (Figure 1) (see <u>Access Saved or Submitted Letters of Intent as a PI</u> or <u>Access Saved or</u> <u>Submitted Letters of Intent as an SPO</u>).

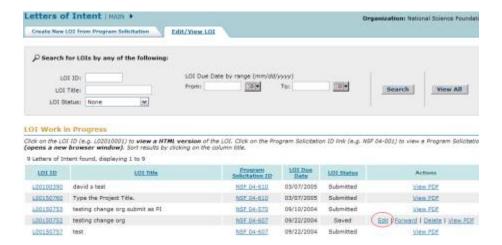


Figure 1 Letters of Intent screen on the Edit/View LOI. The Edit link is circled.

2. Click **Edit** (Figure 1) on the row for the Letter of Intent that you want to edit. The **Edit LOI** screen displays (Figure 2), and you can change any of the fields in the following steps.

rogram Solicitation Inform	sation:		
LOI Due Date:	09/22/2004		
Program Solicitation ID:			
[10] 10명 (THE PART) 10 10명 (THE PART) 10 10명 (THE PART)	Interagency Opportunities in Multi-Scale N	lodeling in Diamedical, Biological, and D	lehavioral Systems
roject Information:			
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* Synopsis:	Nonth Search Trans S		
(mex 2,500 chers)	testing change org		
Organizational Attributes		S Col	*
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institute, NASA or DOE for the primary assignment: (max 255 chars)	testing change org		9
Write an NSF division, NIH institute, NASA or DOE for the secondary assignment: (max 255 chars)	testing change org		0
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Figure 2 Edit LOI screen.

- 3. In the **Project Information** section, in the **Project Title** box (Figure 2), type the Project Title of the Letter of Intent.
- 4. In the **Synopsis** box (Figure 2), type or copy and paste a synopsis of the proposed project.
- 5. From the **Organizational Attribute** drop-down list (Figure 2), choose the organizational attribute (optional).
- 6. Type messages to any or all of the following (Figure 2):
 - NSF division, NIH Institute, NASA, or DOE for the primary assignment (optional)

- NSF division, NIH Institute, NASA, or DOE for the second assignment (optional)
- The Program Officer who has expressed interest in the project (optional)
- 7. In the **Point of Contact for NSF Inquiries** section (Figure 2), click the radio button for either of the following:
 - Use this user as point of contact (individual's information is displayed already)
 - Use (alternate) name as point of contact
- 8. If you use the alternate point of contact:
 - In the **First Name** box (Figure 2), type the alternate's first name.
 - In the **Middle Initial** box (Figure 2), type the alternate's middle initial (optional).
 - In the **Last Name** box (Figure 2), type the alternate's last name.
 - In the **Telephone Number** box (Figure 2), type the alternate's telephone number.
 - In the **Email Address** box (Figure 2), type the alternate's email address.
- 9. In the **Project PI** section (Figure 2), type the following:
 - In the **First Name** box, type the PI's first name.
 - In the Middle Initial box, type the PI's middle initial (optional).
 - In the **Last Name** box, type the PI's last name.
 - In the **Organization** box, type the name of your organization.
- 10. In the **Other Senior Project Personnel** section (Figure 2), *if you need to change information on Senior Personnel or add or delete Senior Personnel*, click the **Add/Edit Personnel** button. See <u>Add/Edit Personnel</u> for instructions.
- 11. In the **Participating Organizations** section (Figure 2), *if you need to add or delete participating organizations*, click the **Add/Edit Organizations** button. See <u>Add/Edit Organizations</u> for instructions.

View the Program Solicitation for a Letter of Intent Forward a Saved Letter of Intent to the SPO Submit a Letter of Intent to NSF Return a Letter of Intent to the PI Delete a Letter of Intent

Forward a Saved Letter of Intent to the SPO

Only a PI may forward a Letter of Intent to the SPO.

1. Access the **Letters of Intent** screen on the **Edit/View LOI** tab (Figure 1) (see Access Saved or Submitted Letters of Intent as a PI).

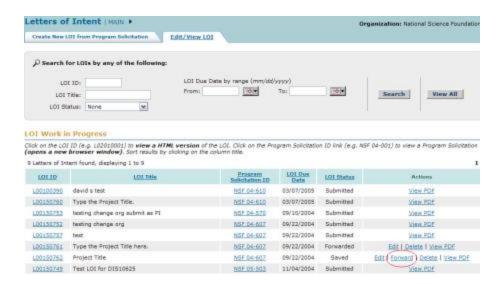


Figure 1 Letters of Intent screen on the Edit/View LOI tab. The Forward link is circled.

2. In the **LOI Work in Progress** section (Figure 1), click **Forward** on the row for the Letter of Intent that you want to forward to the SPO. The **Confirm LOI** screen displays (Figure 2) with a message for you to confirm that you want to forward the Letter of Intent to the SPO.



Figure 2 Confirm LOI screen with the message for you to confirm that you want to forward the Letter of Intent to the SPO. The Forward to SPO button is circled.

3. Click the **Forward to SPO** button (Figure 2). The **Confirmation LOI Forwarded to SPO** screen displays (Figure 3) with the message that the Letter of Intent has been forwarded to the SPO.



Figure 3 Confirmation LOI Forwarded to SPO screen.

- View the Program Solicitation for a Letter of Intent
- Edit a Saved Letter of Intent
- Submit a Letter of Intent to NSF
- Return a Letter of Intent to the PI
- Delete a Letter of Intent

Submit a Letter of Intent to NSF

A PI may submit certain types of Letters of Intent to NSF directly.

An SPO may submit any Letter of Intent.

 Access the Letters of Intent screen on the Edit/View LOI tab (Figure 1) (see <u>Access Saved or Submitted Letters of Intent as a PI</u> or <u>Access Saved or</u> <u>Submitted Letters of Intent as an SPO</u>).

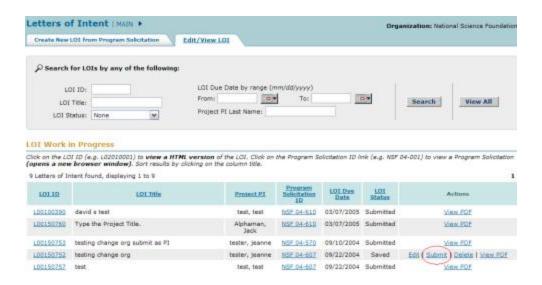


Figure 1 Letters of Intent screen on the Edit/View LOI tab. The Submit link is circled.

2. In the **LOI Work in Progress** section (Figure 1), click **Submit** on the row for the Letter of Intent you want to submit. The **Confirm LOI** screen displays (Figure 2) with the message for you to confirm that you want to submit the Letter of Intent.

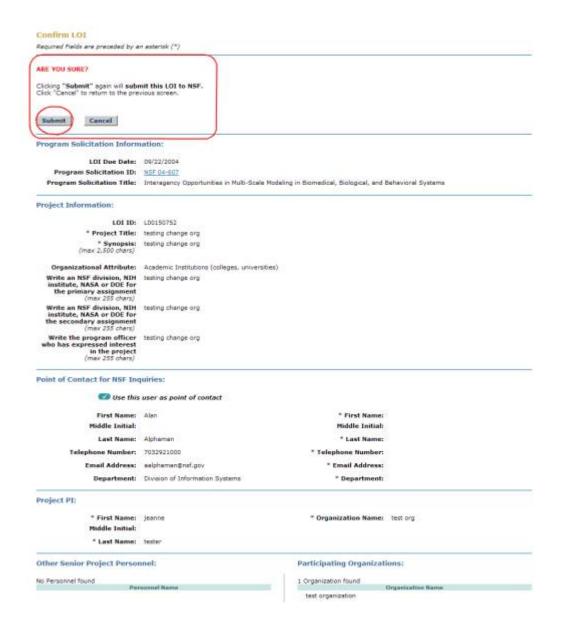


Figure 2 Confirm LOI screen with a message for you to confirm that you want to submit the Letter of Intent to NSF.

3. Click the **Submit** button (Figure 2). The **Confirmation LOI Submitted to NSF** screen displays (Figure 3) with the message that the Letter of Intent has been submitted.



Figure 3 Confirmation LOI Submitted to NSF screen.

- View the Program Solicitation for a Letter of Intent
- Edit a Saved Letter of Intent
- Forward a Saved Letter of Intent to the SPO
- Return a Letter of Intent to the PI
- Delete a Letter of Intent

Return a Letter of Intent to the PI

Only an SPO may return a Letter of Intent to the PI.

1. Access the **Letters of Intent** screen on the **Edit/View LOI** tab (Figure 1) (see Access Saved or Submitted Letters of Intent as an SPO).

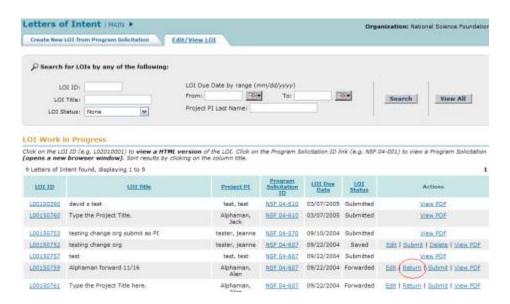


Figure 1 Letters of Intent screen on the Edit/View LOI tab. The Return link is circled.

2. In the **LOI Work in Progress** section (Figure 1), click **Return** on the row for the Letter of Intent that you want to return to the PI. The **Confirm LOI** screen displays (Figure 2) with a message for you to confirm that you want to return the Letter of Intent to the PI.



Figure 2 Confirm LOI screen with the message for you to confirm that you want to return the Letter of Intent to the PI. The Return to PI button is circled.

- 3. In the **Comments for PI** box (Figure 2), type a note to the PI on why you are returning the Letter of Intent (optional).
- 4. Click the **Return to PI** button (Figure 2). The **Confirmation LOI Returned to PI** screen displays (Figure 3) with the message that the Letter of Intent has been returned.

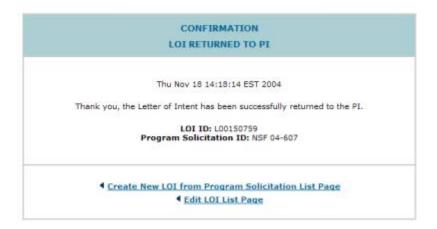


Figure 3 Confirmation LOI Returned to PI screen.

- View the Program Solicitation for a Letter of Intent
- Edit a Saved Letter of Intent
- Forward a Saved Letter of Intent to the SPO
- Submit a Letter of Intent to NSF
- Delete a Letter of Intent

Delete a Letter of Intent

An SPO may only delete a Letter of Intent that the SPO has created. An SPO cannot delete a Letter of Intent a PI has created.

 Access the Letters of Intent screen on the Edit/View LOI tab (Figure 1) (see <u>Access Saved or Submitted Letters of Intent as a PI</u> or <u>Access Saved or</u> <u>Submitted Letters of Intent as an SPO</u>).

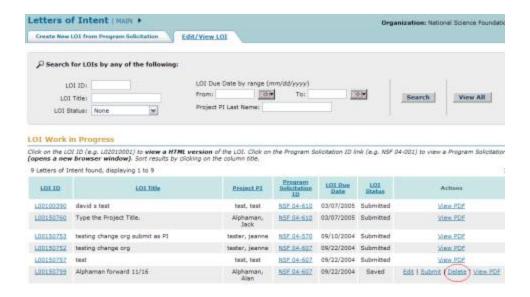


Figure 1 Letters of Intent screen on the Edit/View LOI tab. The Delete link is circled.

- 2. Click **Delete** (Figure 1) on the row for the Letter of Intent that you want to delete. The **Confirm LOI** screen displays (Figure 2) with a message for you to confirm that you want to delete the Letter of Intent.
- 3. Click the **Delete** button (Figure 2). The Letter of Intent is deleted, and the **Letters of Intent** screen displays on the **Edit/View LOI** tab.



Figure 2 Confirm LOI screen with a message for you to confirm that you want to delete the Letter of Intent. The Delete button is circled.

- View the Program Solicitation for a Letter of Intent
- Edit a Saved Letter of Intent
- Forward a Saved Letter of Intent to the SPO
- Submit a Letter of Intent to NSF
- Return a Letter of Intent to the PI

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